



## Position Description Relationship Banker I

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|-------------|--------------------------------|----------------------|-------------------|
| Job Title:  | Relationship Banker I          | Department:          |                   |
| Reports To: | Branch Manager                 | FLSA Classification: | Hourly/Non-exempt |
| Hours:      | Monday – Friday; 40 hours/week |                      |                   |

### Position Summary:

The Relationship Banker I is responsible for embodying the company's core values and serving as a primary, customer service-driven point of contact for delivering retail banking services and products to customers. As the welcoming face of the lobby, the incumbent is dedicated to providing an exceptional customer experience by warmly greeting customers and visitors, promptly addressing inquiries and requests, and ensuring every interaction reflects the highest standard of courtesy and professionalism. This includes processing customer requests, ensuring the accuracy of retail banking transactions, and seizing opportunities to cultivate new business relationships with current and prospective customers. The incumbent is also accountable for upholding adherence to all Bank policies, procedures, and state and federal banking regulations.

Essential duties are not intended to be an exhaustive list of all responsibilities, duties, and skills. They are intended to be accurate summaries of what the job classification involves and what is required to perform it. The omission of specific statements or duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position. To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties and responsibilities of this job.

Bank of St. Francisville is committed to providing equal employment opportunities. We will not discriminate against employees or applicants for employment on any legally recognized basis including, but not limited to, veteran status, race, color, religion, sex, marital status, national origin, physical or mental disability, age, political affiliation, or any other category protected by federal, state, or local law or ordinance.

### Duties/Responsibilities:

- Serve as primary liaison for the lobby, providing a welcoming presence and ensuring customers and visitors receive prompt, courteous attention upon arrival.
- Deliver exceptional, customer service-driven support in all interactions, prioritizing a positive customer experience and fostering lasting relationships.
- Facilitate the opening of new deposit accounts, involving the compilation and preparation of necessary paperwork and applications.
- Engage in cross-selling activities by promoting and opening retail banking products like debit cards and online and mobile banking platforms.
- Address customer and visitor inquiries and requests related to current accounts, deposits, loan payments, statements, debit cards, online and mobile banking, account research, disputes, IRA accounts, etc.
- Identify and address customers' unmet needs by providing appropriate products and services, such as investment services with Team Malara, as well as mortgage and commercial loans.
- Handle incoming calls, providing assistance and information to callers and routing them to the appropriate department as necessary.
- Promote and cross-sell bank products and services to both current and potential customers, including engaging in joint calls with other departments.
- Participate in community events to raise the bank's profile and cultivate business opportunities.
- Collaborate with the team to ensure workflows and tasks are complete while providing support where possible.
- Comply with all bank policies and procedures and regulatory requirements.
- Complete annual, quarterly, and/or as needed training, including BSA, to ensure compliance with all regulatory requirements and Bank policies.
- Maintain the highest level of professionalism and team support while exhibiting BSF Core Values.



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- Perform additional tasks as assigned.

### **Competencies:**

- Excellent communication and interpersonal skills, with the ability to effectively interact with customers and colleagues.
- Demonstrated willingness to learn and adapt to new processes, products, and technologies.
- Strong organizational skills, with a proven ability to handle multiple tasks and prioritize effectively.
- Proficient in time management, capable of meeting deadlines and managing workloads efficiently.
- Exceptional attention to detail, ensuring accuracy and precision in all tasks and transactions.
- Comfortable and proficient in utilizing various technologies and software applications relevant to the role.
- Collaborative team player who works effectively with colleagues and contributes to team objectives and morale.

### **Education and Experience:**

- High school diploma or (GED) required
- One to three years of related experience in customer service and/or training.

### **Physical Requirements:**

This position operates primarily in an indoor setting. It requires long periods of sitting at a desk and operating a computer or other office equipment and frequent periods of walking/standing throughout the day. This position requires frequent communication with others, both speaking and listening. Lifting and carrying up to 15 pounds may be required as necessary.

### **Acknowledgement:**

I have reviewed and understand the responsibilities listed in this job description and acknowledge that I am able to perform the essential functions of the position. I understand that the duties of this position may change on a temporary or regular basis according to the needs of the company, and these changes may not specifically be included in this job description. If I have questions about my position, I understand that I should discuss them with my manager.

I further understand that this job description does not create an employment contract, and my employment is strictly at will unless otherwise agreed upon in writing by the CEO of the company.

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Employee Name (Print)

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Employee Signature

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Date